



2025 CHILD CARE LANDSCAPE ANALYSIS

Setting the Stage:

What You Need to Know About Child Care in Onondaga County

This factsheet examines child care supply, demand, and availability gaps in Onondaga County, New York as of December 2024. It summarizes a full report that builds on and updates the findings of a 2021 study conducted in partnership with Syracuse University's Maxwell X Lab.

The boxes at right outline key issues within the current child care business model and provide essential context for understanding the data explored in the following pages.



Public-Private Imbalance

Child care functions as a public good but is largely financed by parents paying for care out of pocket. Some support comes from the federal Child Care Development Block Grant, and New York State has increased its investment in recent years.

Funding Discrepancies

Child care is the backbone of economic stability and growth for our community. And yet, despite serving the critical early years from birth-five, the child care system receives far less public funding per child than the K-12 public school system.

Unsustainable Model

The current finance model falls short on both ends. It neither offers providers sustainable, living wages that reflect the value and demands of their work, nor does it ensure that families have access to affordable, readily available care.

Poor Compensation

Provider reimbursement and/or payment rates fall well below the true cost of care, and child care wages have not kept pace with general market wage increases. As a result, child care is an unattractive option in the labor market.

Recent Updates: Progress Without Permanence



New York State has put significant funding into the child care system in recent years, but the majority of investments have been temporary or non-recurring. While helpful, the additional funding is neither financing the system at the level needed nor addressing systemic inequities.



In New York State, the early childhood educator workforce is **5.6 times** more likely to live in poverty than elementary and middle school teachers.¹



50% of early educator households participate in one or more public safety net programs, costing the state **\$535 million** annually.¹



Since 2020, New York State has steadily expanded the Child Care Assistance Program², increasing affordability, eligibility, and the market rate (payment) for providers. However, funding remains unpredictable and is insufficient to support all eligible families.



The average cost of child care in Onondaga County ranges from **\$10,660 - \$20,020** per child, depending on age and modality of care.



Onondaga County has invested significant local tax dollars in child care since 2020. These investments have primarily focused on improving the quality of care but also included a series of one-time investments to support infrastructure.



1. McLean, C., Austin, L.J.E., Powell, A., Jaggi, S., Kim, Y., Knight, J., Muñoz, S., & Schlieber, M. (2024). Early Childhood Workforce Index – 2024. Center for the Study of Child Care Employment, University of California, Berkeley. <https://cscce.berkeley.edu/workforce-index-2024/>.
2. Child care assistance in New York State is governed by the Office of Children and Family Services (OCFS) through the New York State Child Care Assistance Program (CCAP). Assistance is provided through a variety of federal and state funds, with counties providing matching dollars. Families utilizing CCAP pay a small portion of the cost of care while the remainder of the cost is covered through the program.

The Current Landscape: Limited Access, Evolving Supply

DEFINING LICENSED CAPACITY: The data in this report is based on licensed capacity. This means that New York State has approved the child care slot, but not necessarily that there is staffing available to operate it. Also, a licensed slot may not meet a family’s actual needs – It might not be available full time, during the hours parents require, in a convenient location, or at a cost they can afford.

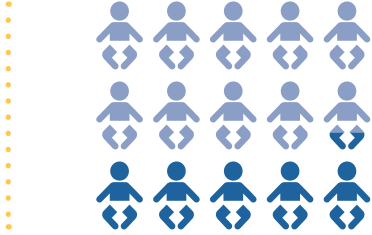
ESTIMATING DEMAND: The demand side of the equation is estimated using data from the 2018-2023 American Community Survey (ACS) 5-year population estimates. For this analysis, demand is defined as the number of children aged zero to five living in a two-parent household where both parents are employed, or in a single-parent household where the single parent is employed. In calculating demand, it is assumed that a non-working parent can stay at home to care for their children, thus eliminating the need for child care services outside the home.

Key Finding: Supply Isn’t Meeting Demand



The gap in available child care remains significant. As of 2024, licensed child care in Onondaga County meets **60%** of demand.

This is an improvement compared to 2021, when licensed child care met just **44%** of demand.



Infant and toddler care is in crisis: we can only meet **35%** of demand. That translates to approximately **7,000** infants and toddlers without child care in Onondaga County.

2024 Child Care Supply Gap

Ages	Max Potential Demand	Available Supply	Supply Gap	Supply Gap (%)
Infants & Toddlers (Ages 0-2)	10,617	3,535	7,082	65%
Preschoolers (Ages 3-5)	11,024	9,375	1,649	15%
Total	21,641	12,910	8,731	40%

3. In New York State, legally exempt child care refers to informal child care arrangements that are not required to be licensed or registered with the New York State Office of Children and Family Services. These arrangements typically involve care provided by a friend, family member, or neighbor in a private residence. Only two (2) non-related and/or eight (8) related children are allowed to be cared for. Legally exempt programs are not subject to health, safety, and training standards unless they care for children who receive government child care subsidies.

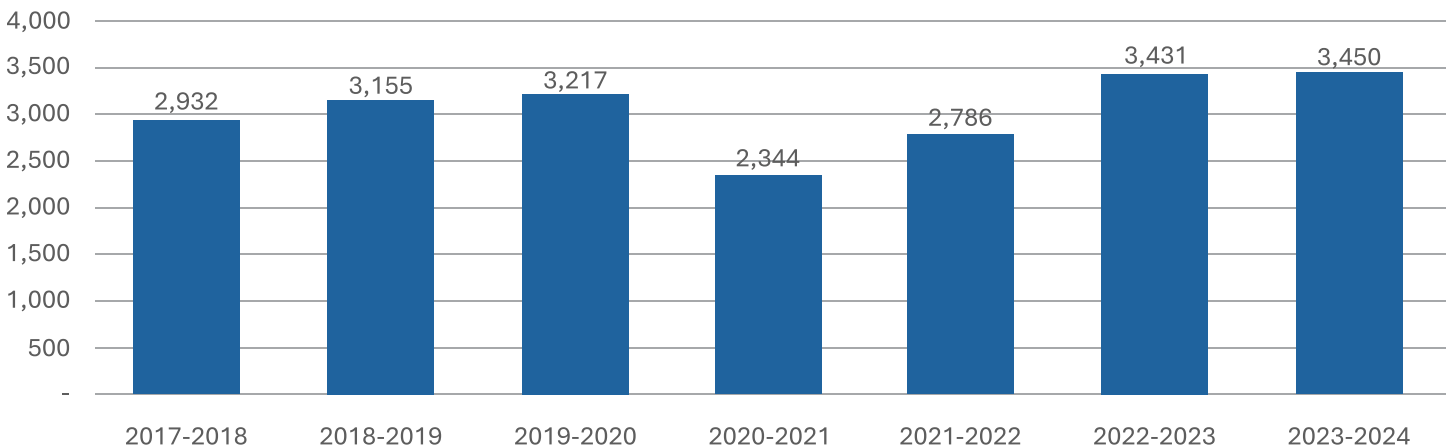
Key Finding: UPK Access is Expanding

There has been a large increase in the number of Pre-K slots in our community, and more school districts are participating in Universal Pre-K (UPK) than before the pandemic. The big change is that the majority of part-time slots have converted to full-time (which is typically school day hours).



There are **295** more UPK slots available to families in Onondaga County than before the pandemic.

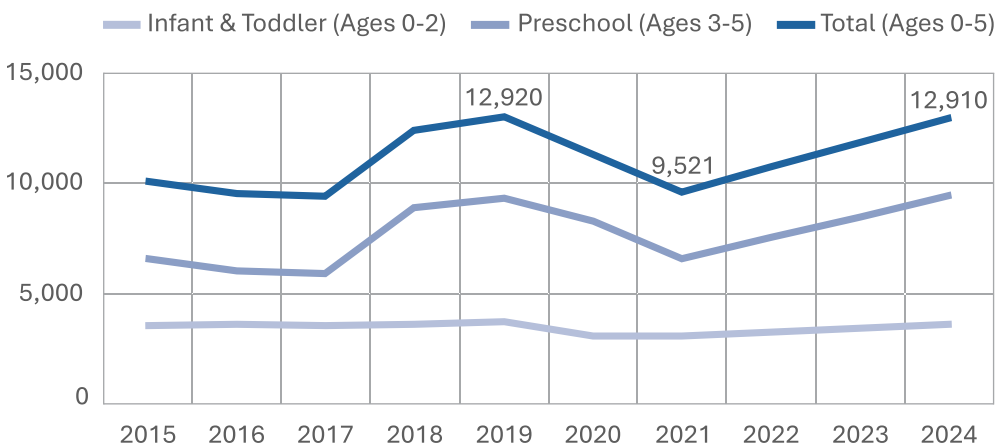
UPK Slots (Half and Full Day) By Year, 2017-2024



Note: “UPK slots” refers to the number of slots available, not the number of children enrolled.

Key Finding: The Workforce is Strained

Provider Capacity Trends, 2015-2024



Overall, Onondaga County has **35 fewer** providers than before the pandemic. The decrease has been most notable for in-home child care with a single provider.

Note: Provider capacity refers to the number of slots available for child care, not the number enrolled in licensed and unlicensed care. Additionally, trend lines were imputed for 2022 and 2023 due to lack of data during those years.